

BEACON Support Team (BST) Sponsor Meeting

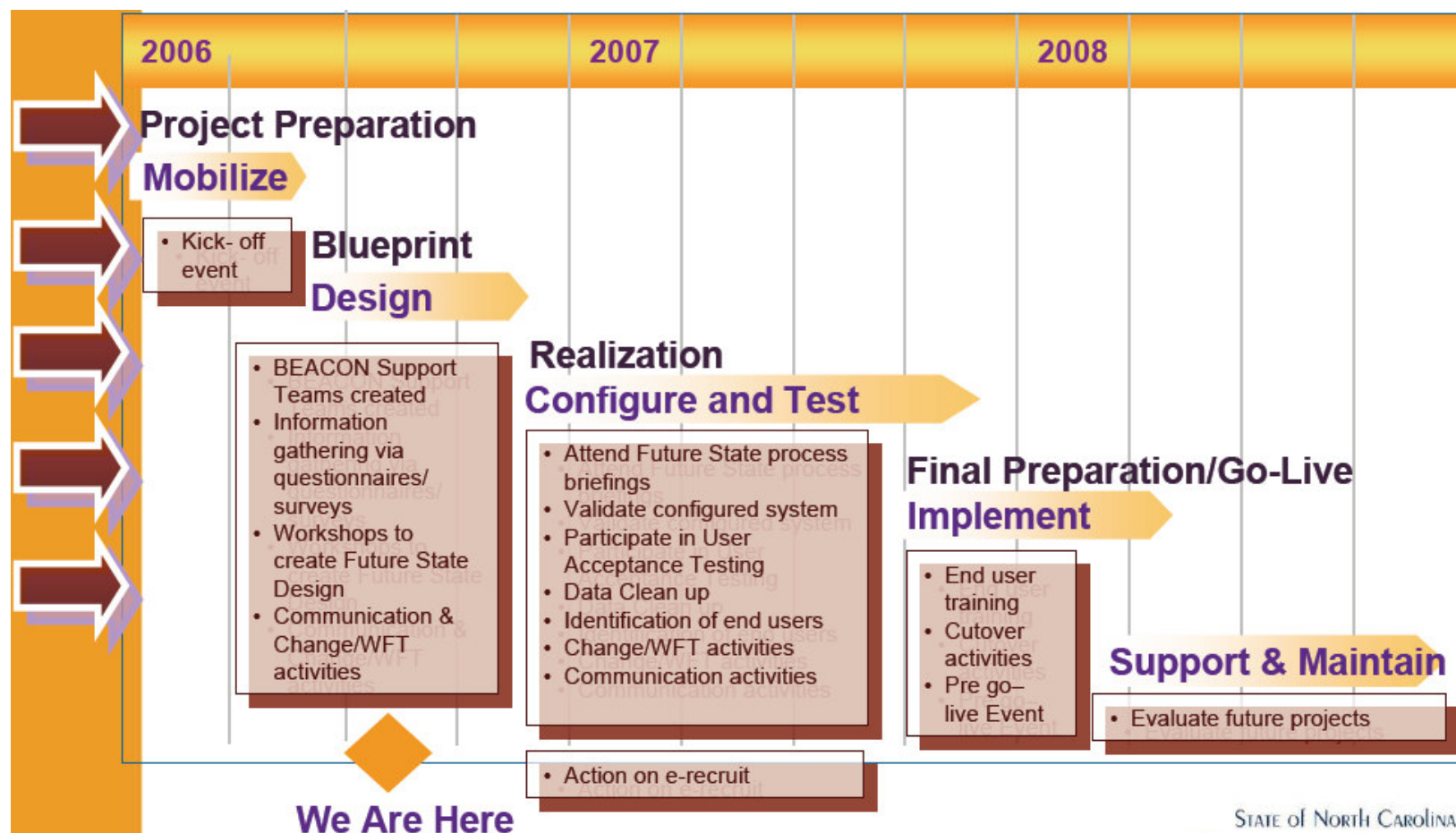
September 26, 2006

Agenda

- Project and Governance Update
 - Lowell Magee
- Change Management Strategy Overview
 - Tom Legare
- Communications Update
 - Tyler Jones
- Upcoming Project Activities
 - Libby Williams
- Questions and Answers

Project Update

Project Update



STATE OF NORTH CAROLINA

Governance Update - Standardization Advisory Committee

Objective of Standardization Advisory Committee

Work directly with BEACON HR/Payroll Team PMO and Functional Teams, in coordination with State organizational leadership and BSTs to:

- Utilize best practices that support standardization of policies and processes
- Review policies and establish processes that are used to produce a strategic, cost effective business model that can be supported long term
- Minimize ongoing maintenance of the BEACON HR/Payroll system
- Maintain confidentiality of sensitive material presented for review

Standardization Advisory Committee Membership

Agency	Name	Function
Dept. of Environment and Natural Resource (DENR)	Rod Davis – Chair	Enterprise
Office of State Personnel (OSP)	Pamela Bowling	HR
	Chris Clemmons	HR
	Shari Howard	HR
Office of the State Controller (OSC)	Ben McLawhorn	Enterprise
	Tammy Wood	Payroll
Dept. of Health and Human Services (DHHS)	Anna Bass	Payroll
	Kathy Gruer	HR
Dept. of Transportation (DOT)	Angela Faulk	HR
Dept. of Insurance (DOI)	Tammie Hicks	Payroll
Dept. of Corrections (DOC)	Tracy Little	Enterprise
Dept. of Revenue (DOR)	Frank Rogers	HR
Dept. of Secretary of State (SOS)	David Shehdan	HR
Dept. of Cultural Resources (DCR)	Rick Stone	HR
Administrative Office of the Courts (AOC)	Kenneth Williams	HR

Change Management Strategy Overview

Change Management Objectives



Focus on Issues and Risk

Implementation and Benefit Realization

Collaborative Process

- Address the “people” issues and risks associated with the BEACON HR/Payroll Project to promote a successful implementation
- Increase the probability of a successful BEACON HR/Payroll Project implementation and accelerate benefit realization by:
 - Creating awareness, understanding, and urgency within the state concerning changes in HR and Payroll processes
 - Preparing and equipping state leaders and employees to thrive in the new BEACON HR/Payroll environment
- Focus on helping the State of North Carolina implement the BEACON HR/Payroll Project across the traditional state agency silos

Change Management is Risk Management

- BEACON HR/Payroll Project presents great opportunities, but also poses significant implementation risks
- Implementing the BEACON HR/Payroll Project requires addressing a number of “people” related risks comprised of:
 - Political issues
 - Cultural issues
 - Personal issues
- BEACON HR/Payroll change management approach requires that “people” related risks be managed for successful implementation

Critical BEACON HR/Payroll “People” Risks



- State leaders not engaged in the process



- Interruptions of day-to-day state operations



- State organizations feel that they have little or no input



- Pressure to preserve local state systems and processes



- State employee morale suffers in uncertain environment



- Simultaneous rollout of other state initiatives



- State employees confused about new HR/Payroll processes



- State employees not adequately prepared to execute



- Scope is beyond state organizations' capability to execute



- State's ability to implement a new HR/Payroll shared services strategy

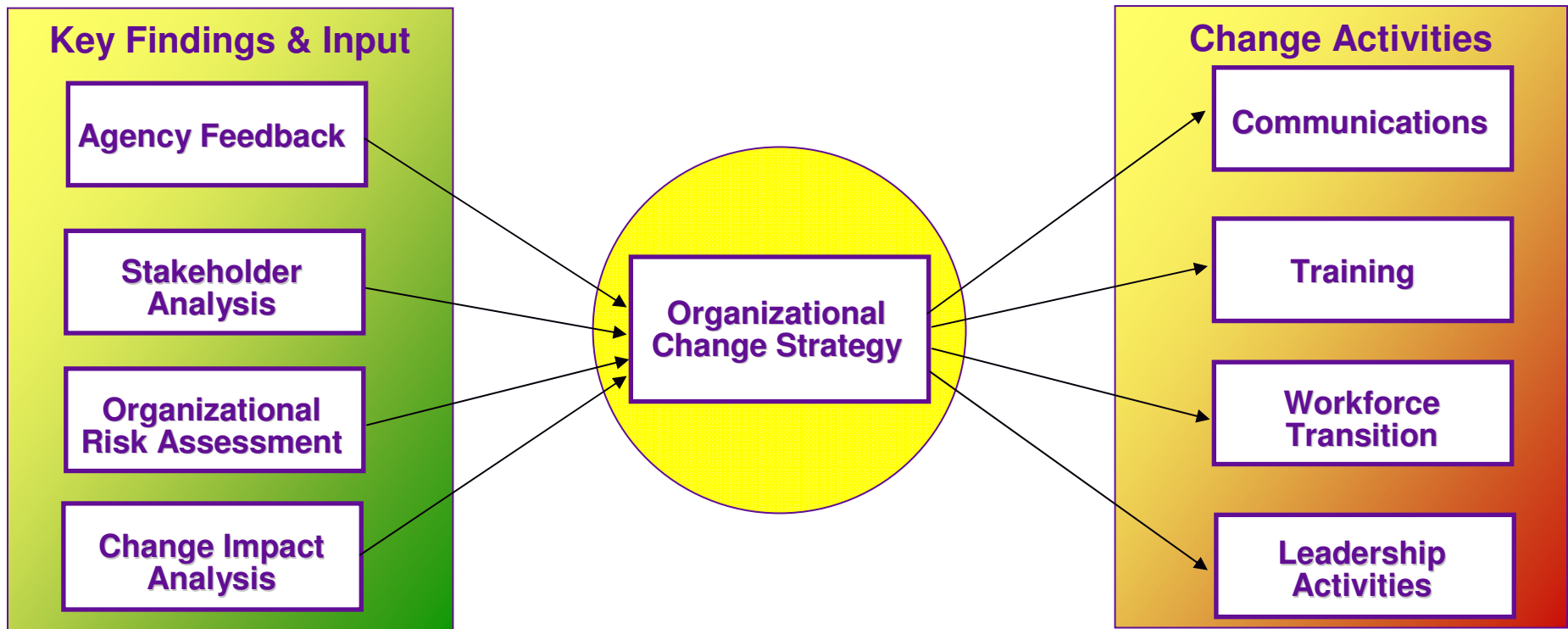
BEACON HR/Payroll “People” Risks Can Be Costly

- Project overruns and delays due to missed milestones
- Workforce ill-equipped to be effective in the new environment
- Inconsistent acceptance of changes across the State
- Significant remedial work needed after implementation
- Workforce morale and performance decline
- Project leaders’ credibility and reputation suffer
- In-adherence to new processes and procedures






**Key risks need to be identified and addressed early in the
BEACON HR/Payroll Project**

Organizational Change Strategy Purpose

Based on the feedback we collect from agencies, the BEACON HR/Payroll Project Team will develop an organizational change strategy that provides the basis to plan and prepare everyone for the new system.



Change Management Activities and Deliverables by Phase

	Project Prep	Blueprint	Realization	Final Prep	Go-Live
Assess & Monitor Organizational Risk 		<ul style="list-style-type: none"> Stakeholder Analysis Organizational Risk & Readiness Assessment 		<ul style="list-style-type: none"> End User Readiness Assessment 	
Mobilize & Align Leaders 	<ul style="list-style-type: none"> Articulate Case for Change* 	<ul style="list-style-type: none"> Organizational Change Strategy BEACON Support Teams* Change Management Oversight Committee* 	<ul style="list-style-type: none"> Leadership Strategy and Action Plans* BEACON Support Teams* Change Management Oversight Committee* 	<ul style="list-style-type: none"> BEACON Support Teams* Change Management Oversight Committee* 	<ul style="list-style-type: none"> BEACON Support Teams* Change Management Oversight Committee*
Engage & Communicate with Stakeholders 	<ul style="list-style-type: none"> Start-Up Communications Plan External Kickoff Meeting 	<ul style="list-style-type: none"> Update/Execute Communications Plan Awareness & Feedback Events* 	<ul style="list-style-type: none"> Update/Execute Communications Plan Awareness & Feedback Events* 	<ul style="list-style-type: none"> Update/Execute Communications Plan Awareness & Feedback Events* 	<ul style="list-style-type: none"> Communications Go-Live Implementation Support
Prepare & Equip the Workforce 		<ul style="list-style-type: none"> Knowledge Transfer Strategy Training Strategy Workforce Transition Planning Workshop* 	<ul style="list-style-type: none"> Role Descriptions & Mapping Job Impact Assessment Workforce Transition Strategy & Plan 	<ul style="list-style-type: none"> Workforce Transition Checklist/Scorecard 	<ul style="list-style-type: none"> Workforce Transition Go-Live Implementation Support*
Address Organizational Implications 			<ul style="list-style-type: none"> Job Design & Descriptions Organizational Change Design 	<ul style="list-style-type: none"> Organizational Design Checklist/Scorecard 	<ul style="list-style-type: none"> Organization Design Go-Live Implementation Support*

Organizational Change Strategy Focuses on What Works

Change Management activities required to move the State from its current structure and processes to the future BEACON HR/Payroll processes and shared services structure will focus on:

- Addressing project risks, not changing the State’s culture
- Identifying – and beginning to address – people risks from the outset
- Driving state leaders to consensus on key issues
- Leveraging individual state leaders and their strengths
- Emphasizing state stakeholder events to drive understanding and acceptance
- ‘Taking the pulse’ of the state organizations – “Are we winning over the hearts and minds of those most affected by this?”
- Developing workforce strategies and plans early enough to ensure readiness
- Anticipating and addressing state organizational implications

Communications Update

Monthly Communications Toolkit

Monthly Communications Toolkit will be posted to password protected area of HR/Payroll section of BEACON website. Toolkit content will include:

- **Key messages specific to each phase of the project**
- **Brochures, posters and other collateral**
- **Custom communications for agency newsletters**
- **Communication vehicle recommendations**



Components of Monthly Toolkits

Type	Overview	How to Use
Brochures	<ul style="list-style-type: none"> Marketing brochures will be updated periodically and contain current/timely project information. 	<ul style="list-style-type: none"> Team Leads and Communication Agents will be asked to distribute either electronic versions or printed hard copy versions of the brochures to agency/university employees.
Presentations	<ul style="list-style-type: none"> Each month the BEACON HR/Payroll Communications Team will prepare an updated presentation that will provide: <ul style="list-style-type: none"> –Status Update –Key Monthly Messages –Accomplishments –Feedback and Next Steps 	<ul style="list-style-type: none"> BST members will be asked to present the information to employees in a variety of venues, including: <ul style="list-style-type: none"> –Agency-wide meetings –Departmental meetings –Small group meetings
Newsletters	<ul style="list-style-type: none"> “The BEACON View” will be published on a bi-monthly basis. Content of the newsletter will vary dependent on the phase of the project. 	<ul style="list-style-type: none"> Communication Agents will be asked to distribute either electronic versions or printed hard copy versions of the newsletter to agency/university employees.
Articles	<ul style="list-style-type: none"> The BEACON HR/Payroll Communications Team will on an ad hoc basis create articles for use by the Communication Agents. 	<ul style="list-style-type: none"> Communication Agents will use the articles in compiling: <ul style="list-style-type: none"> –Agency/university specific newsletters –Content for agency/university website –Creating internal memorandum

BEACON Website

- The password-protected area of the site is in the process of being updated.
- Among other pertinent information, this site will contain BST presentation materials, workshop documentation, brochures and posters.

Username: hr_payroll

Password: hrpyrbpt



Delivery

- The initial Communications Toolkit will be distributed at the October kickoff meeting, with updated toolkits provided at subsequent meetings
- Toolkits and other information will also be posted to the password protected area of website

- To ensure that the Communication Team is kept updated on communication efforts within each agency, Communication Agents are asked to regularly provide reports regarding their initiatives.
- Information provided will help clarify and quantify who we are communicating to, as well as how often they are receiving information.
- We will be tracking each agency's communications efforts and include it as part of the BST Scorecard.

Timeline for Key Messages

Phase	Communication Objectives	Broad Themes/Messages
Business Blueprint	<ul style="list-style-type: none"> • Introduce project, identify scope and objectives for each phase in order to inform the employees of the project and to build overall awareness and enthusiasm • Create confidence that BEACON will be marked by open and honest two-way communications and knowledge sharing 	<ul style="list-style-type: none"> • Provide context on blueprinting workshops including: frequency, purpose of the sessions, information collecting • Highlight the importance of stakeholders participation • Provide overview of ESS concept and functionality
Realization	<ul style="list-style-type: none"> • Continue to manage expectations and deal with any perceived employee resistance 	<ul style="list-style-type: none"> • Provide overview of the system is functionality (Demo) • Conduct road-shows to provide general population with a view of new system • Provide background on testing and the role of employees in the process. • Detailed description of ESS/MSS features • Detailed impacts to employees (including core users)
Final Preparation	<ul style="list-style-type: none"> • Prepare the community for change impact through training and targeted education efforts 	<ul style="list-style-type: none"> • Provide organizational readiness information • Distribute training communications- Date, time, etc. • Keep employees informed on what to expect at go-live
Go-Live	<ul style="list-style-type: none"> • Deal with any unexpected concerns and issues 	<ul style="list-style-type: none"> • Provide information related to additional training if needed • Share project successes • Provide information on preparations for next phase of the project

Targeted Communications Groups

- Agency Leadership
 - Secretaries and Deputies
 - CFOs and CIOs
- Agency Core Users (HR/Payroll)
- State Employees (Employee Self Service for End Users)
- University Leadership
 - University President
 - University Chancellors and Vice Chancellors
- BEACON Support Team Sponsors Leads and Agents
- Subject Matter Experts

Communications Roles and Responsibilities

- **BST Sponsors**
 - Support and monitor communication activities within their agencies and provide assistance when necessary
 - Identify communications opportunities at your agency and get BEACON on the agenda
 - Give the BST Leads and Communications Agents the authority to communicate throughout your agency
 - Communicate BEACON HR/Payroll Project information to agency leadership
 - Encourage agency leadership to deliver key BEACON HR/Payroll Project information to agency staff
 - Identify communications issues and risks
 - Do we have enough resources to be successful?
- **BST Leads**
 - BST Leads are expected to take an active and visible role in communicating BEACON HR/Payroll information and promotional materials within their respective agencies.
 - Communicate issues and status to **agency leaders and BST Sponsors**
 - BST Leads are responsible for **supporting** BST Communications Agents in planning and conducting targeted BEACON HR/Payroll Project awareness and progress meetings with agency staff.
 - Identify key agency and departmental meetings
 - Request time on the meeting agenda

Communications Roles and Responsibilities

- **BST Communication Agents**
 - BST Communications Agents are expected to plan and conduct targeted BEACON HR/Payroll Project awareness and progress meetings with agency staff on a monthly basis (more often if needed).
 - Identify key agency and departmental meetings
 - Request time on the meeting agenda
 - Identify the need for additional or custom communications materials
 - Identify communications issues
- **BEACON HR/Payroll Communications Team**
 - The BEACON HR/Payroll Communications Team will provide BST Leads and Communication Agents with BEACON communications materials and support agencies in delivering key messages.
 - Monthly Communications Toolkit
 - Communications timeline
 - Custom communications for newsletters, departmental meetings, and agency meetings
 - Timely website updates and the addition of new password enabled links to BST presentation materials and workshop documentation



Communication Agents by Agency

Administrative Office of the Courts

Russ Eubanks

Department of Administration/Lt. Governor's Office

Valerie Ford and Elaine Barnes

Department of Agriculture and Consumer Services

Teresa Pierotti

Department of Commerce

Chet Mottershead

Department of Corrections

Sandra Barnes

Department of Crime Control and Public Safety

Patty McQuillan

Department of Cultural Resources

Lindy Allen

Department of Environment and Natural Resources

Diana Kees

Department of Health and Human Services

Debbie Crane

Department of Insurance

Tami Luckwaldt

Department of Justice

Alan Sanders

Department of Juvenile Justice and Delinquency Prevention

Kim Yonkers

Department of Labor

Becky Brown

Department of Public Instruction

Kris Knowler

Department of Revenue

Frank Rogers

Department of the Secretary of State

Bruce Garner and Peter Goolsby

Department of the State Treasurer

Rhonda Langston

Department of Transportation

Ernie Seneca

Employment Security Commission

Larry Parker

Information Technology Services

Danny Lineberry

NC Education Lottery

Randi Seran

NC Housing Finance

Trisch Amend

Office of State Budget & Mgmt./Governor's Office

Ursula Hairston

North Carolina Community College System

Jane Phillips

Office of Administrative Hearings

Arlo Lund

Office of State Personnel

Margaret Jordan

Office of the State Auditor

James Forte and Chris Mears

Office of the State Controller

Dennis Patterson

State Board of Elections

Linda Mathis

State Health Plan

Beverly Harris and Gwen Tann

Wildlife Resources Commission

Carol Batker and Eli Warren

NC School of Science & Math

Connie Boyce

NC School for the Arts

Debbie Gunter

Upcoming Communications Activities

What can you expect from us?

- Finalized Communications Toolkit
- Website redesign
- Password-protected website access
- September/October edition of *"The BEACON View"* newsletter
- Communications strategy overview (completed in Blueprint Phase)
- Communications Calendar outlining key messages and opportunities
- Onboard BST Communications Agents

October 2006 Agency Events

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
						1
2	3	4	5	6	7	8
9	10	11 • DOT Div. 2 Wellness Fair - Pitt Co. Fairgrounds, Greenville (300 attendees) • NCJSA Conference - Marriott, Carolina Beach (150 attendees)	12 • NCJSA Conference (Juvenile Services) - Marriott, Carolina Beach (150 attendees)	13 • NCJSA Conference (Juvenile Services) - Marriott, Carolina Beach (150 attendees)	14	15 • Voc. Rehab Conf. - Chapel Hill
16 • Vocational Rehabilitation Conference - Chapel Hill (200+ attendees)	17 • Vocational Rehabilitation Conference - Chapel Hill (200+ attendees)	18 • Vocational Rehabilitation Conference - Chapel Hill (200+ attendees) • DOT Div. 4 Wellness Fair - Fairgrounds, Wilson	19	20	21	22
23 30	24	25 • NC Probation/Parole Association - Sea Trail, Sunset Beach (100 attendees)	26 • NC Probation/Parole Association - Sea Trail, Sunset Beach (100 attendees)	27 • NC Probation/Parole Association - Sea Trail, Sunset Beach (100 attendees)	28	29

Upcoming Project Activities

Upcoming Project Activities

What do we need from you?

- Examine BST Scorecard information on BEACON website to determine areas that need to be addressed
- Complete BEACON Technical Readiness Questionnaire
- Communicate BEACON HR/Payroll Project information to agencies
- If appropriate, submit any remaining Wave 1 Design Session questionnaires

Upcoming Project Activities

What can you expect from us?

- Onboard BST Communications Agents
- Rollout Communications Toolkit for BST Leads/Communications Agents
- Update BEACON HR/Payroll Project website on weekly basis
- Draft next edition of “The BEACON View” newsletter
- Validate stakeholder position classification statistics
- Communicate organizational risk assessment findings

Questions?

Upcoming BST Lead Meetings

Date	Time
Tuesday, October 24 th	10 am – 11 am
Tuesday, November 28 th	10 am – 11 am
Tuesday, December 19 th	10 am – 11 am

Check out the BEACON HR/Payroll Project website at:

www.beacon.nc.gov



BEACON HR/Payroll Project Resources

If you have any questions pertaining to the BST or Communications, please contact:

- **Edward Brodsky**
edward.brodsky@ncosc.net
Phone: 919-431-6520
- **Tyler Jones**
tyler.jones@ncosc.net
Phone: 919-431-6523